# Ideas/Strategies on Convening Your Initial Stakeholder Meeting

The following document incorporates responses by state content coordinators to Deborah Nolen of South Carolina, who posted the following question to the LawHelp listserv:

*We're about to have our initial Stakeholder meeting and would like to set a reasonable amount of time aside to conduct the meeting without asking for too much of a time commitment. I also have a few other questions. I greatly appreciate any answers so feel free to answer a few of them or all of them based on your experience.*

*1) I'd like to know what some of you that have conducted the initial session consider reasonable?*

*2) If you had an opportunity to do it again, what should you have covered and didn't and vice versa?*

*3) Did you provide refreshments, coffee, lunch, etc?*

*4) What type of handouts did you provide the potential stakeholders during the session?*

*5) About how many people committed to becoming a stakeholder at the meeting and how many did you have to follow-up to get a commitment?*

*6) What website topics seemed to generate the most interest?*

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### Maureen Skahan (Virginia):

We held a "mini" stakeholder meeting of key project staff to sketch out the agenda and topics. The meeting was set for 2 hours and we held to it. More than that tends to make people restless. The stakeholders groups is divided in two...primary is the legal aid program representatives, the Virginia State Bar (pro bono coordinator), law school reps, LSCV, VPLC...the secondary will consist of the larger community, including private bar reps, community service providers, advocates, clients and others and we review the list. Handouts included an outline of the Lawhelp template, some information regarding copyright, an agenda (which is in the Lawhelp library), information on content length and readability and one or two other items that seemed relevant at the time but which I cannot remember now. Coffee was all that was provided. Hope this helpful. good luck

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### Catina Drywater (Oklahoma):

Congratulations on getting your first meeting set up. We had our first one in May here in Oklahoma and I was confused about where to start also. I think a good place to start is the Law Help Library for statewide websites. Several states have put agendas on the site which was extremely helpful to me. Also, there is a great power point presentation available. I scheduled my meeting for an hour which I felt was pretty reasonable. I utilized the Legal Meetings Technology to get members to join from across the state—it was great and several attendees were very impressed. I handed out the basic information sheet on Probono.net's template. I also invited Allison McDermott to add anything just in case I left something out. Oh, and I did serve some snacks because I held my meeting mid-morning/lunch time. I think we had pretzels, chex mix, juice and water. Hope this helps!! Good Luck!

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**Nancy Kleeman (Minnesota):**

Having Internet access with a projector to show the site (somewhere else if necessary) really helps as does a handout with some of the key screens.

We always find that treats help!

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**Molly French (Colorado):**

We're about to have our initial Stakeholder meeting and would like to set a reasonable amount of time aside to conduct the meeting without asking for too much of a time commitment. I also have a few other questions. I greatly appreciate any answers so feel free to answer a few of them or all of them based on your experience.

1) I'd like to know what some of you that have conducted the initial session consider reasonable? ............Ours was set for 1 1/2 hours, we actually finished a few minutes short of that (the attendees were happy about that).

2) If you had an opportunity to do it again, what should you have covered and didn't and vice versa? .......I used a PowerPoint presentation, and I noticed that a lot of questions came up early (before I came to that information in my presentation) and to avoid repetition I had to skip over a few of the slides. If you'd like to have a copy of the presentation let me know - there are a few similar to it in the probono.net practice area library and I didn't want to be repetitive (mine is a compilation of those that currently exist and are posted in the library plus a few enhancements).

3) Did you provide refreshments, coffee, lunch, etc? ..........Bagels, coffee the usual (we had it in the a.m.)

4) What type of handouts did you provide the potential stakeholders during the session? ..........A copy of the presentation, a wish list of things we asked them to help with (included in the presentation) and attachments that I didn't get to in the presentation due to time constraints but wanted to share the information with them (articles, content we have and gaps in content that we need to fill, etc.) I actually had sign up sheets at the meeting and asked the Stakeholder's to sign up for different tasks based on their interests, time available, resources, etc.

5) About how many people committed to becoming a stakeholder at the meeting and how many did you have to follow-up to get a commitment? ..........We had 24 people commit before the meeting, 20 came to the meeting and about 12 committed to helping with specific tasks at the meeting (they signed up), the others I am in contact with to see how they would like to be involved. We also received two referrals to people who might be interested in participating as Stakeholders from the attendees (we asked them to refer someone if they thought it would be a good match).

6) What website topics seemed to generate the most interest? ..........The information we are including on our site (Consumer, Housing, Employment, etc.) - we had a lot of comments and suggestions on that. Also we had questions about budgets and finances (How much does it cost to set up a computer system in a courthouse that the public could access? What did it cost to get your website up and running?). Questions about accessibility and questions about plans of offering the site information in different languages. Also questions about the password access to the advocate side. Good questions and we had saved time for that at the end, although most of the discussion and questions arose during the 'meat' of the presentation.

.........Quick answers to your questions - hope it helps. Good luck!

**Tracey Roberts (Georgia):**

Here are my best ideas for your stakeholder meeting.

(1) You have to lead people. The stakeholders aren't going to get up by themselves and organize themselves to get the web site done. For the most part, they probably don't care about the web site and have other things they'd rather be doing. Even the ones who do care will put in as little effort as possible. If I were you, after the stakeholder meeting, I'd go to each practice group and office of Colorado Legal Services to make a similar presentation to the one you are doing for the stakeholder meeting, so that every employee of your organization knows what you are doing.

(2) Provide Vision. The way to lead people is first to give them a vision of where you want to go. Let them know where they are (folks are dismally bereft of legal services) and where they can be - show them through the Northwest Justice Project's site or through our site if you like - http://lawhelp.org/ga (though we are still posting docs, we've got over 250 up right now).

(3) Tell them what you need and when you need it. I'm not sure where you are in the process and whether you've got your content development teams together or not. You need to be able to tell them what you want them to do. Then you need to sign them up and get them committed to doing the things you want them to do. In order for them to agree, they'll need (a) an estimate of how much time they will need to spend and (b) an outline showing the tasks and the deadlines for those things to be completed. Project management plans are good for this - hit the high points of the things you want (i.e. kinds of help to do particular tasks, money for particular parts of the development process, summer clerks to help load documents and links) that you don't already have.

(4) Alleviate their Fears. If you want them to develop content (for the public side), tell them that they probably won't have to do anything from scratch. Tell them that a number of other legal web sites have allowed other states to copy their material and revise it to conform to the other states' law, which is an editing job and not something that takes as much time.

(5) Email and Telephone. Make sure you get email addresses and phone numbers for everyone who attends the stakeholder meeting. After the meeting, call everyone who shows up and tell them how much you appreciated their coming, confirm the tasks that they are supposed to complete and the deadlines for completing them. Use email to send out a massive thank you, to keep non-attendees informed of what's going on, and to send out updates on the status of the web site development.

GETTING STARTED / ORGANIZING YOUR STAKEHOLDERS' MEETING

PURPOSE:

The Stakeholders are your main resource for developing the website. They (or people within their organizations) are going to provide content, identify grant funds, give you connections with other movers and shakers in the state, find you workers to help assemble the site, and provide ideas.
There's no reason to keep the committee small. The more people at the table, the more resources and ideas that you will have. Also, when it comes time to rolling the web site out, the more people and organizations involved, the easier it will be to make sure that the entire state knows about your new web site and assist in funding any marketing you need to do.

In general I wouldn't worry about a large group causing decision-making to be difficult. If you invite everyone, the final decision-making group will be largely self-selecting. The folks who are interested will attend, want input on the decision-making and will help you get resources to do what you've decided to do. The folks who are not interested won't show up. In addition, they won't be able to complain that they weren't invited to the table.

PROCESS:

First, look at the list of the types of organizations that were supposed to be involved in the Stakeholder Committee according to the binder that we were provided at the October 24-26 conference to determine who I should contact for involvement: Legal Service Organizations, Pro Bono Programs, Law Schools, Bar Associations, IOLTA Programs, and Court Systems reps. If that's who LSC wants involved, who are we to limit it?

Second, go through your state bar association handbook and start making lists. If you don't have a bar handbook, contact the state bar association and request a list of all of the legal service organizations in the state, all of the law schools, all of the local bar associations and the diversity bar associations, all of the bar committees (especially those that deal with indigent defense and pro bono work and pro se groups and the courts), all of the law school clinic programs. Also contact the folks who distribute IOLTA funds and get a list of all of their grant recipients with names of contact people, phone numbers and email addresses. (I organized everything into a table in MSWord, with the email addresses in the right hand side of the table - that way when you go to put all of the stakeholders' email addresses into an email, you select that column of the table, and it selects all of the addresses with a single click.)

Third, find out when all of the Bar committees meet, find out when the legal service organizations have staff meetings or managers meetings, figure out when the continuing education courses dealing with issues relating to poverty law are going on, contact them and arrange an opportunity to speak to all of them at their next meetings.

Fourth, cold call all of the legal service organization executive directors, all of the bar committee chairpersons, all of the relevant IOLTA recipients, the folks at the administrative office of the courts, the IOLTA funds managers, the law school clinical program directors, the pro bono program directors, and the various bar associations. Schedule a stakeholders' meeting a month away, tell them what you are doing, tell them about the stakeholders meeting, and get their email addresses so that you can send out email notice with an agenda. Ask them who else should be involved in the process and get them to go through their rolodexes with you on the phone to give you names, addresses, phone numbers of additional folks who should be involved. Call all of them and verify their contact information.

Fifth, (1) develop an explanation of what the web site will have on it and what it will do for low income people in your state, (2) develop an agenda for the Stakeholders' Meeting (on the Pro Bono Net web site), (3) send this information out via email to everyone on your stakeholders' list, with the date, time, location of the stakeholders meetings, directions about how to get there (and a map if possible), and parking instructions. I didn't send out a letter, I just used telephone and email to keep the costs low. See copies of my emails to Legal Services Organizations and to other groups below.

Sixth, hold the Stakeholders' meeting (use WebEx technology to teleconference and web-conference people in from remote areas of the state).

> 1) Walk everyone through the Minnesota web site showing them the features of the site.
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> 2) Go over a list of things that you are going to have to tackle to get the site up and running.
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> 3) Distribute your project management plan at this time to get things rolling. It's good to try to put together an initial draft of the plan with all your best ideas first, since, when people read things and you talk to them about what you are planning to do and how you are going to do it, the document spurs their imagination and ideas. You can get a copy of the initial Georgia Project Management Plan from the Pro Bono Net web site.

Seventh, have at least two more Stakeholders meetings to draw more people into the process.